



Planche • Politz • Ledet *LLC*
Beyond the Numbers

Client Name

Tax Planning Questionnaire
For the Year Ending December 31, 2025

Please check the box in response to each question and provide details where applicable.

- Y N N/A
- Did you have a substantive change in income from last year? If yes, please provide details in the box below.
- If your prior year return included estimated tax payments for the current year, did you make any of the payments? If yes, provide dates and amounts below.

<u>US Amount</u>	<u>Date Paid</u>	<u>State Amount</u>	<u>Date Paid</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Y N
- Did you have any changes to your dependents in the current year?
- Did you invest in/sell an interest in a business?
- Did you have substantial gains or losses in your investment portfolio?
- Did you buy or sell any real estate (personal residence, rental property, land, etc)? If yes, please provide details in the box below.

Additional Details